

OPENGOV TRAINING

By: Business Improvement & Performance Office

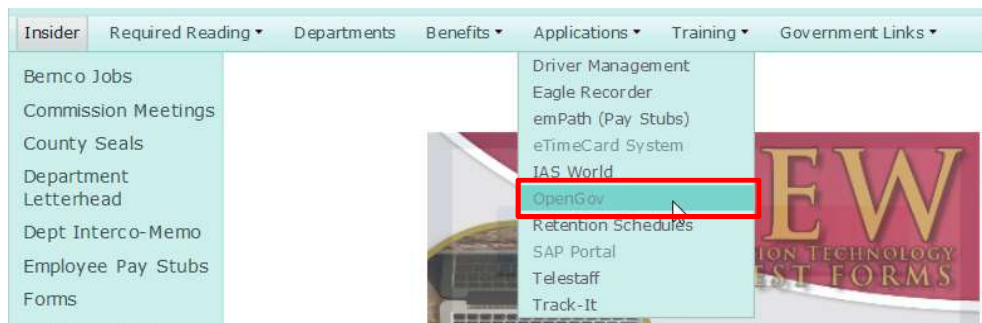
Veronica Schornack

AGENDA

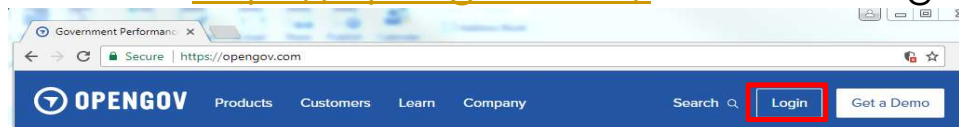
- OpenGov Login
- Customize Homepage
- Report Navigation
- Dashboards Navigation
- Stories Navigation

OPENGOV LOGIN

- To access OpenGov, navigate from BC Insider -> Applications -> OpenGov:



- OpenGov is internet based and can be accessed from anywhere
 - Go to <https://opengov.com/> and click Login in the top right hand corner



- To directly access OpenGov Reports, click the link below
 - OpenGov Reports (login required): <https://controlpanel.opengov.com>

OPENGOV LOGIN CONT.

- Login using Bernco email address
- If you need your password reset, click on 'Forgot your password?'
- For additional help logging in or requesting new user access contact Business Improvement & Performance Office, contact information on the last slide



Email

mzuniga@bernco.gov

Password

●●●●●●●●

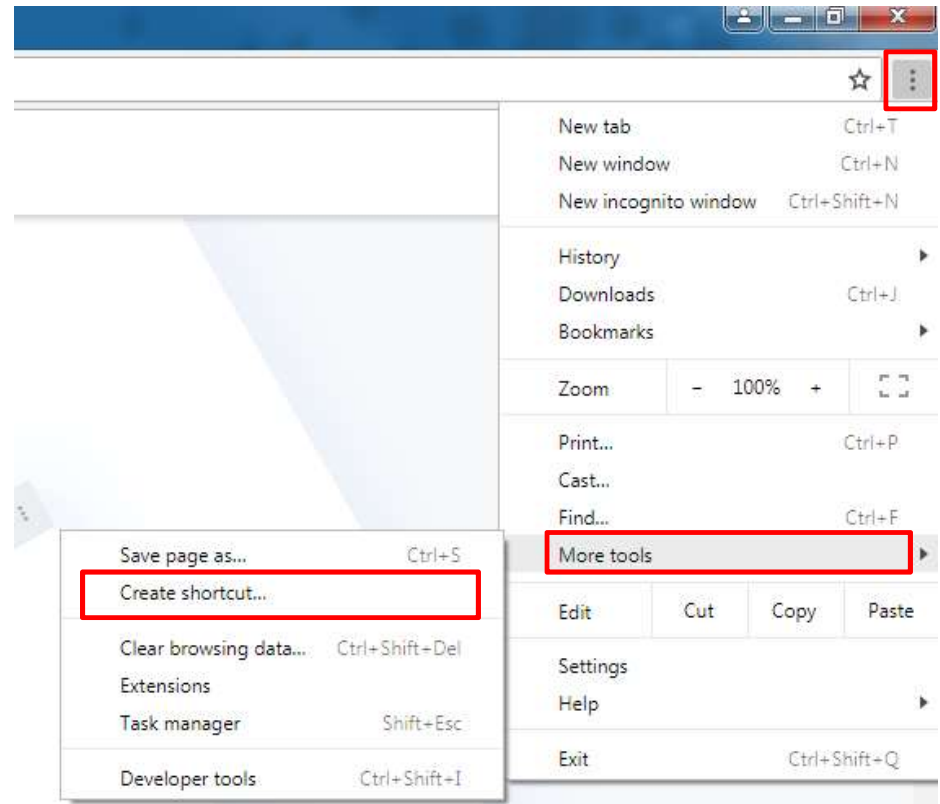
☐ Remember me

Sign in

[Forgot your password?](#)

GOOGLE CHROME SHORTCUT





- Always use Google Chrome to launch OpenGov
- Download Google Chrome to computer
 - <https://www.google.com/chrome/>
- Add OpenGov as an icon on your computer desktop
 - Navigate to OpenGov Login and follow the screen shot



OPENGOV OVERVIEW

- Cloud based software
 - Available on any computer with login
- Build reports using data from any system that extracts to excel
 - Data must be 'machine readable'
- Analyze financial and non-financial data through easy-to-understand, interactive graphs
- Utilize reports for public/transparent or internal use
- Create Stories to add context to data using graphs, pictures, text, videos, or embedded documents

REPORT TRANSPARENCY

Report Icon	Report Type	Report Description
	Transparent	Reports are available to the public through Bernco.gov, the direct link is: https://bernalillocountynm.opengov.com/transparency#
	Network	Reports are available to OpenGov Customers through the "Network" tab on the left hand corner of the screen. OpenGov customers can share and view each other's reports to compare data or view unique reports. All users with a login can utilize the Network tab.
	Organization	Reports are available to all users with an OpenGov login. If a blue report tile is on your homepage you can review the data
	Private	Reports can be created and set private to include individual users. Only users who are invited will see the report on the homepage

OPENGGOV HOMEPAGE

- Navigate between Reports, Dashboards, and Stories
 - OpenGov always defaults to Reports

The screenshot shows the OpenGov homepage interface. On the left is a vertical sidebar with icons for NETWORK, REPORTS (highlighted), DATA, PORTAL, STORIES, and SETTINGS. The main content area is titled 'Reporting' and has tabs for 'Reports' and 'Dashboards'. Below the tabs is a search bar labeled 'SEARCH: Search for reports'. The main area displays three report tiles: '01 Budget vs Actuals' (a bar chart), '02 Position Counts' (a data table), and '03 Tax Dollars at Work' (a pie chart). Each tile includes a title, an update date, and a small OpenGov logo.

Annotations on the slide:

- An arrow points to the 'REPORTS' icon in the sidebar with the text: "Reports will always be defaulted".
- An arrow points to the 'Dashboards' tab with the text: "Click here to open Dashboards".
- An arrow points to the 'STORIES' icon in the sidebar with the text: "Click here to open Stories".
- A bracket groups the three report tiles with the text: "Each blue tile is a Report".

01 Budget vs Actuals
Updated December 7, 2017

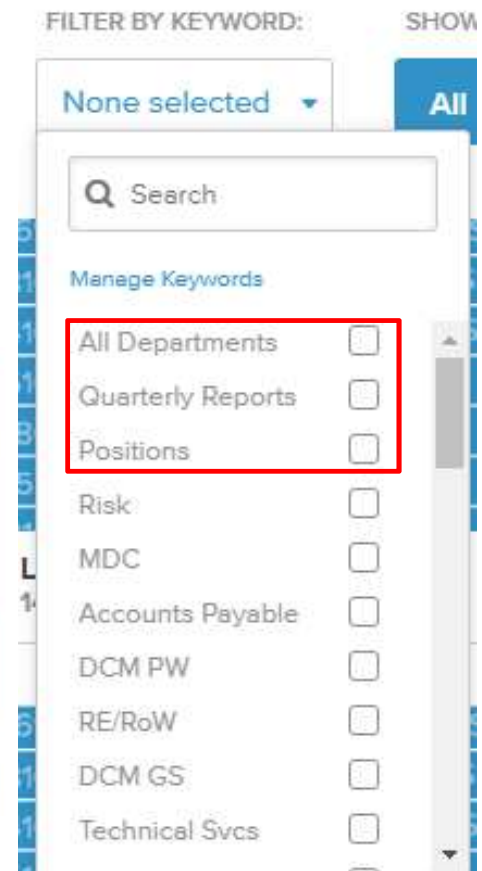
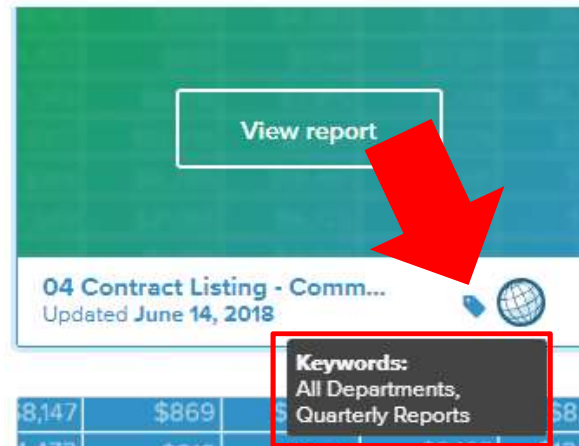
02 Position Counts
Updated March 26, 2018

03 Tax Dollars at Work
Updated December 20, 2017

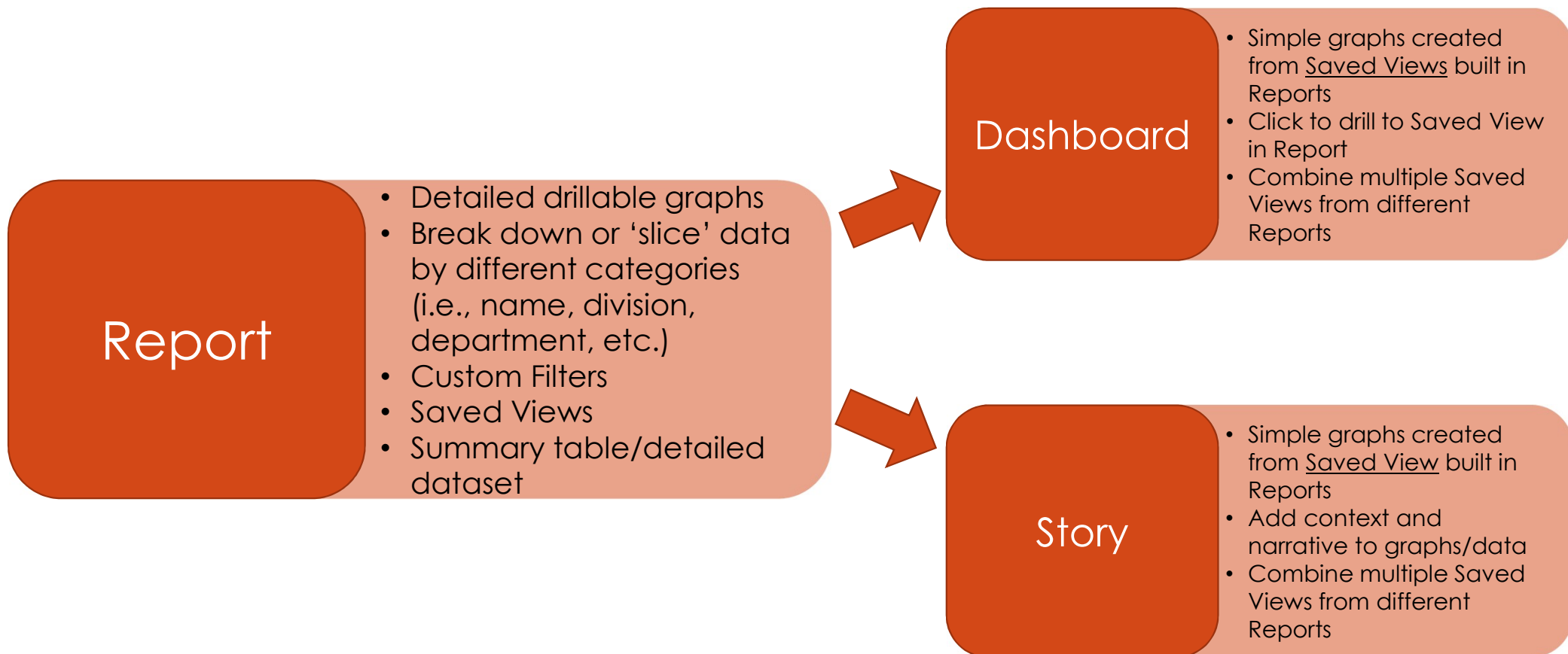
\$8,147	\$869	\$4,263	\$2,167	\$8,416
\$4,472	\$816	\$1,144	\$3,162	\$12,516
\$1,543	\$8,416	\$2,815	\$1,729	\$6,286
\$517	\$12,516	\$2,471	\$329	\$1,941
\$319	\$6,286	\$16,461	\$7,281	\$1,549
\$1,549	\$21,153	\$6,723	\$1,941	\$2,167
\$1,543	\$8,416	\$2,815	\$1,729	\$6,286

OPENGOV HOMEPAGE CONT.

- Customize homepage to show frequently used reports by setting Filters by Keyword
- Click the checkboxes that apply to reports you want to see based on job duties, interests, department needs, etc.
- OpenGov remembers selection after you log out



OPENGOV FUNCTIONALITY



REPORTS - NAVIGATION

1. Saved Views: prebuilt views for frequently asked questions or common searches
2. Filter Panel: apply custom filters such as, date ranges, greater than/less than, key words, include/exclude data
3. Data Table: view summary data by Broken Down By selection or line item detail (i.e., spreadsheet view)
4. Search Bar: search for any term throughout the entire dataset
5. Graph: drill to data by clicking on the graph or legend

1.

2. Filters Views

SHOW

Contract Amount (\$)

BROKEN DOWN BY

DIVISION

FILTERED BY All >

Filters >

Columns >

Aggregates >

AMOUNTS

Incremental

TARGET

Add a Target >

TOTAL FOR ALL YEARS

\$440,735,901.91

Q Search in table

Search

4.

Back Reset

Contractors referenced in contract listing are subject to change due to expiration of contracts and agreements resulting in the need to re-solicit procurements, which could result in new contractors providing services.

VISUALIZATION

200M

150M

100M

50M

0

2017-18

2018-19

2019-20



Sort Large to Small

COUNTY MANAGER

PUBLIC WORKS

HEALTH & PUBLIC SAF...

GENERAL SERVICES

COMMUNITY SERVICES

FINANCE

3.

Summary

Details

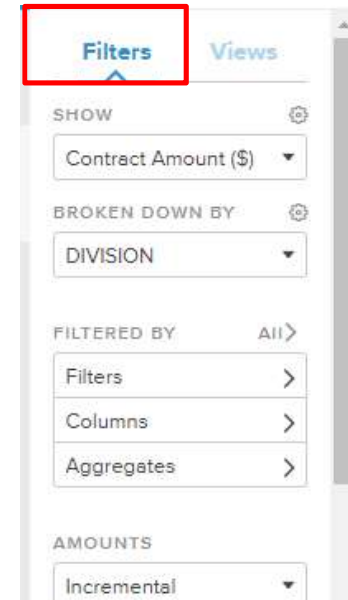
DIVISION	2017-18	2018-19	2019-20	Total
COUNTY MANAGER	\$81,972,763.06	\$52,743,214.42	\$52,468,589.26	\$187,184,566.74
PUBLIC WORKS	48,132,250.13	26,183,758.49	26,543,232.60	100,859,241.22
HEALTH & PUBLIC SAFETY	27,853,951.57	16,754,278.30	16,761,035.61	61,369,265.48

REPORTS - NAVIGATION

Saved Views: pre-filtered views of data/graph, usually by department



Filters: customize data/graph to view specific information

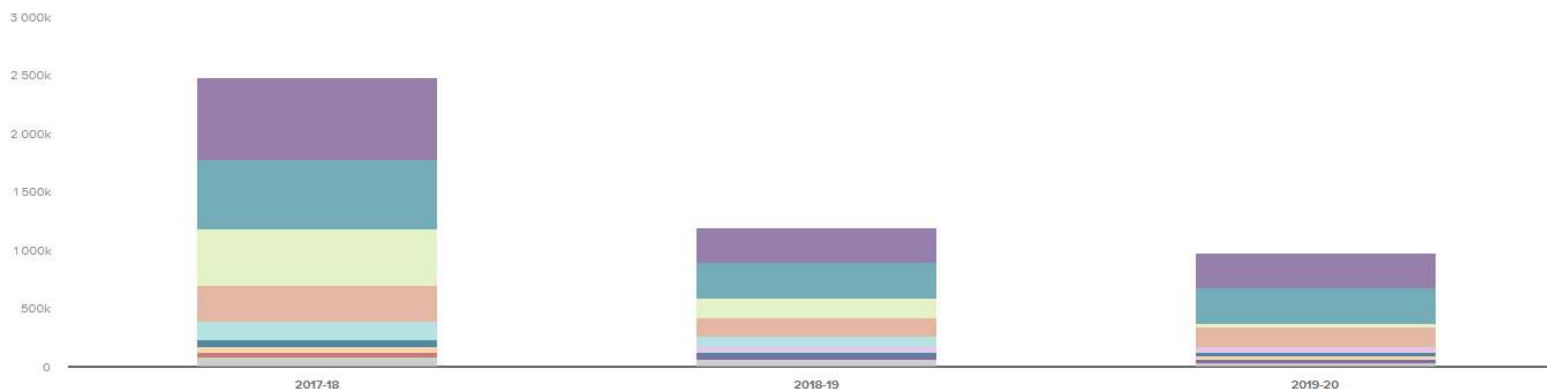


REPORTS – SAVED VIEWS

- Created by report administrators
- List of common or favorite views, like a bookmark
 - Good starting point before you apply filters
 - Most reports have saved views by division or dept
- Example: [Contract Listing - Assessor](#)

Contractors referenced in contract listing are subject to change due to expiration of contracts and agreements resulting in the need to re-solicit procurements, which could result in new contractors providing services.

VISUALIZATION



Filters

Views

B. FY19 Approved Contracts - Assessor

Sort Large to Small

PICTOMETRY INTERN...

TYLER TECHNOLOGI...

ESRI INC. (ENVIRON...

THE MASTERS TOUC...

ROBLES RAE & ANA...

RICOH USA, INC.

SUPREME MAINTENAN...

COSTAR REALTY INF...


REPORTS – SHOW

- Select numerical column to sum/total data
- Totals can include counts or dollar amounts
 - # of trips
 - Total cost of trip (\$)
 - Airfare (\$)



REPORTS – BROKEN DOWN BY

- 'Slice' data by categories
 - Department
 - Division
 - Name

BROKEN DOWN BY 

- County Credit
- Card Status
- Certifications
- License CEUs
- Funded
- Code of
- Conduct
- Conf City**
- Conf Country
- Conf State

Sort Large to Small ▾

ALBUQUERQUE

LAS VEGAS

COSTA MESA

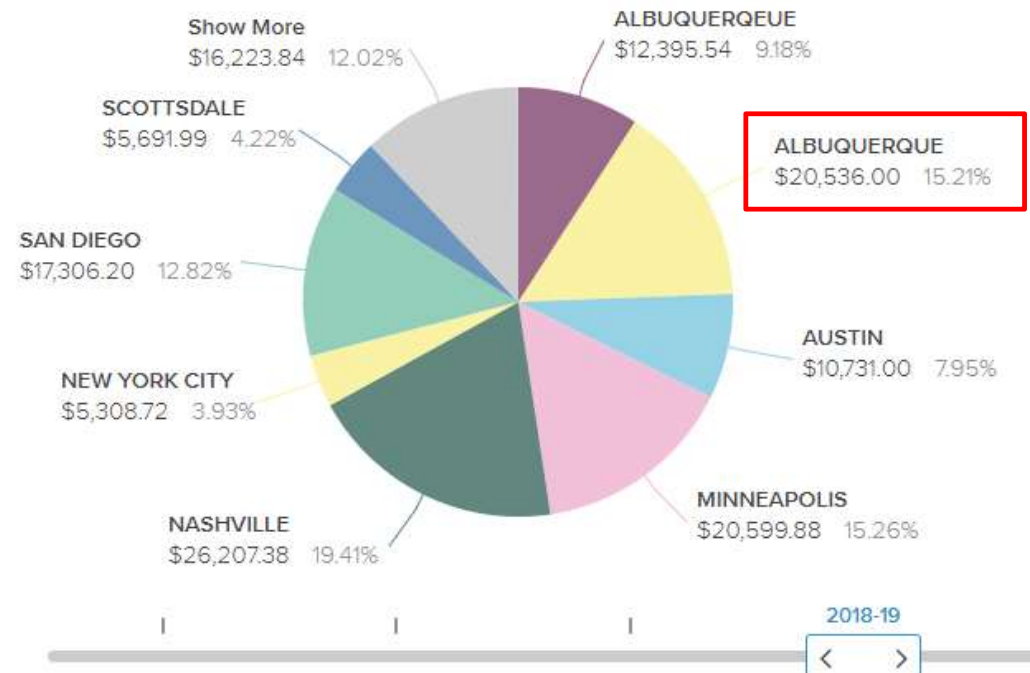
SAN DIEGO

SANTA FE

PHOENIX

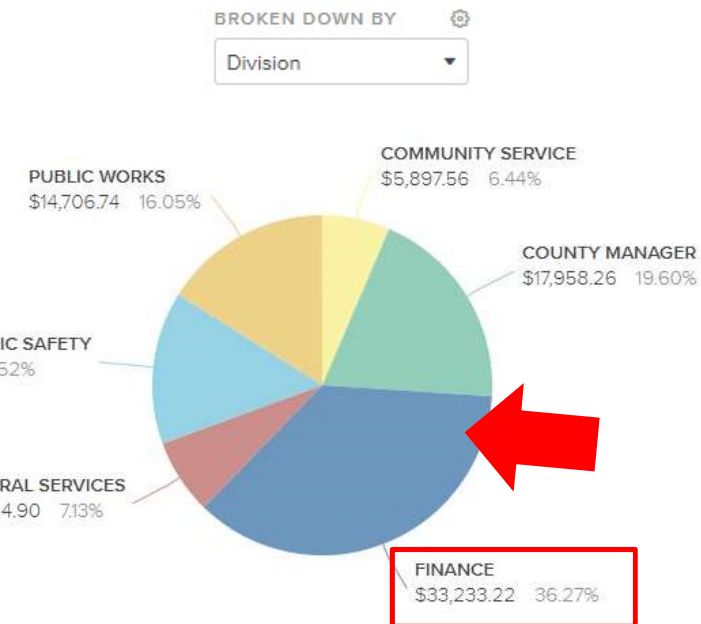
BOSTON

ORLANDO

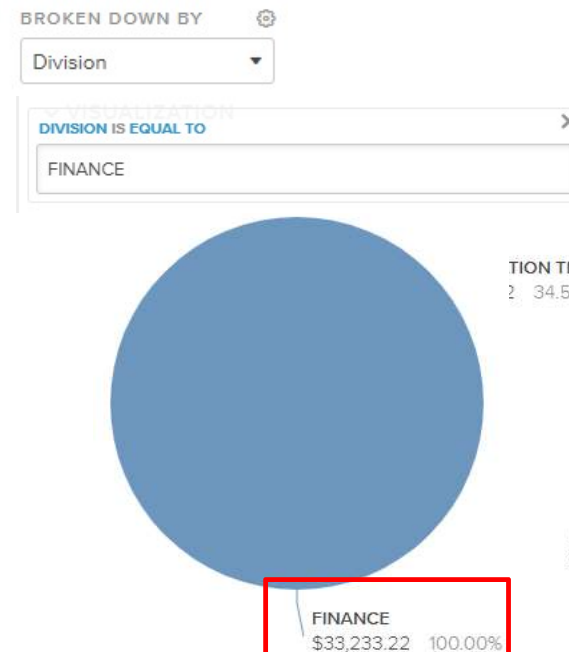


REPORTS – BROKEN DOWN BY CONT.

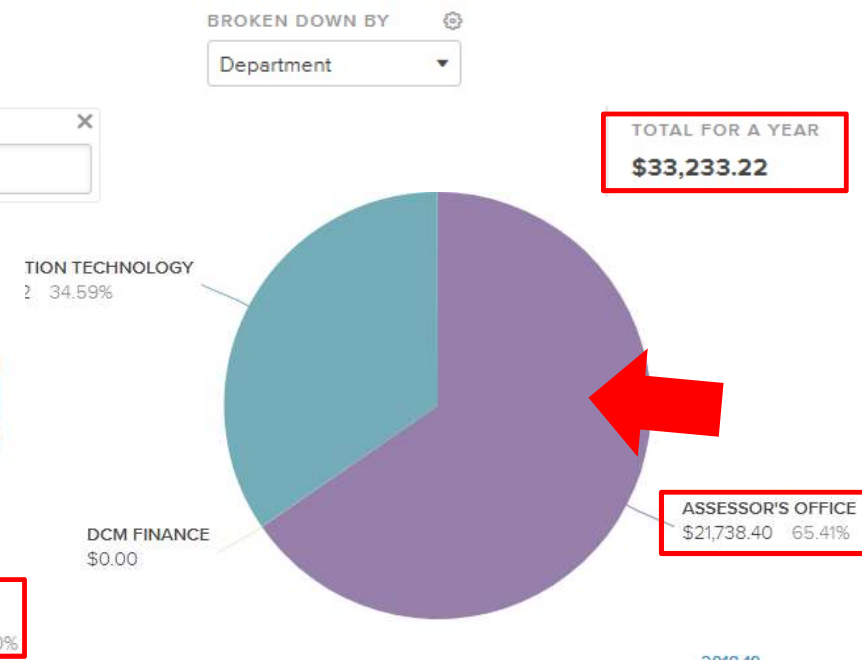
Click on pie slice to drill into a single division - Finance



You are only looking at costs associated with Finance Division



Change Broken Down By to see the pie slice by Department – click Assessor



REPORTS – BROKEN DOWN BY CONT.

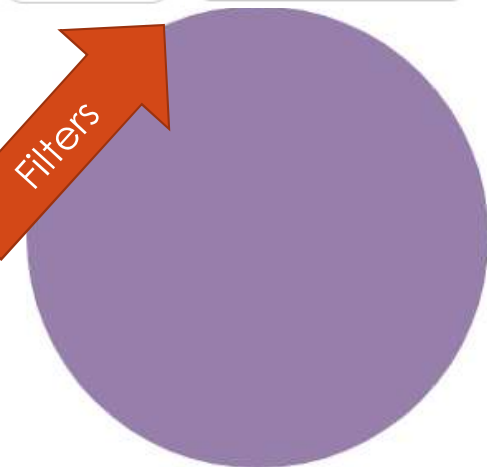
You are only looking
at the Assessor's

BROKEN DOWN BY

Department

= FINANCE x

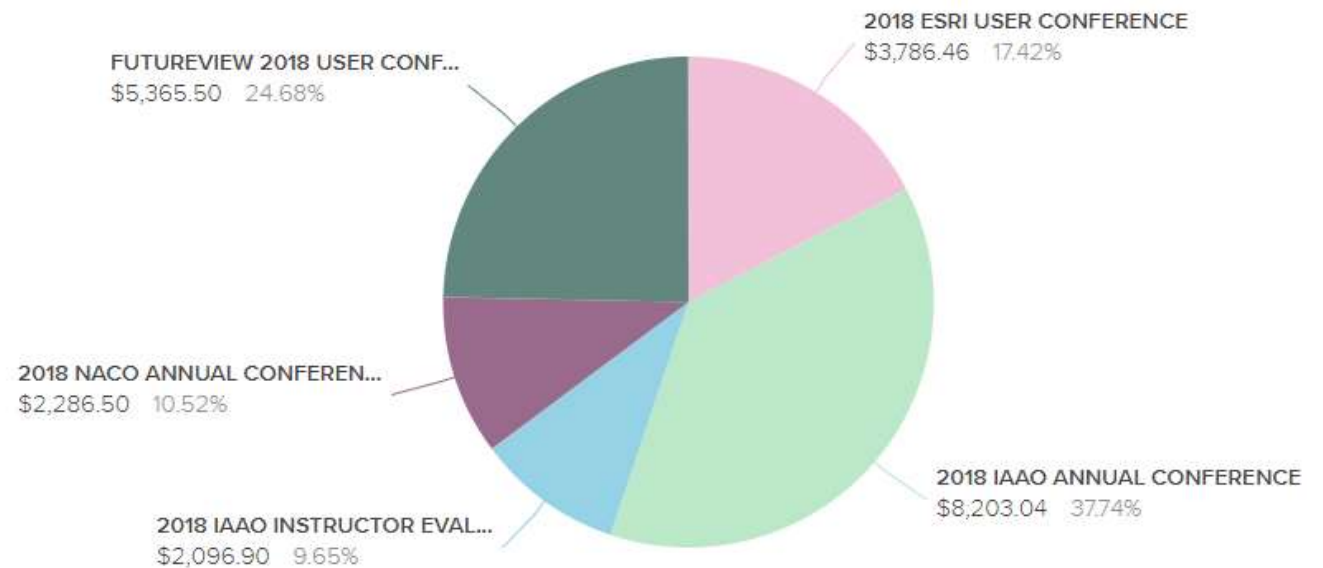
= ASSESSOR'S OFFICE x



Slice the pie by changing Broken Down By
Conference Name

BROKEN DOWN BY

Conference Name



TOTAL FOR A YEAR

\$21,738.40

REPORTS – FILTER BY

- Filtered By: add new filter to analyze data

SEARCH ACROSS ALL DATA

Search in table

Add New Filter

Apply

- Select type of filter (i.e., contains, equal to, not equal)

contains

equal to

not

blank

not blank

- Select column to apply filter

CCN#

CONTRACT DESCRIPTION

CONTRACTORS

Contract Amount (\$)

Contract Status

DEPARTMENT

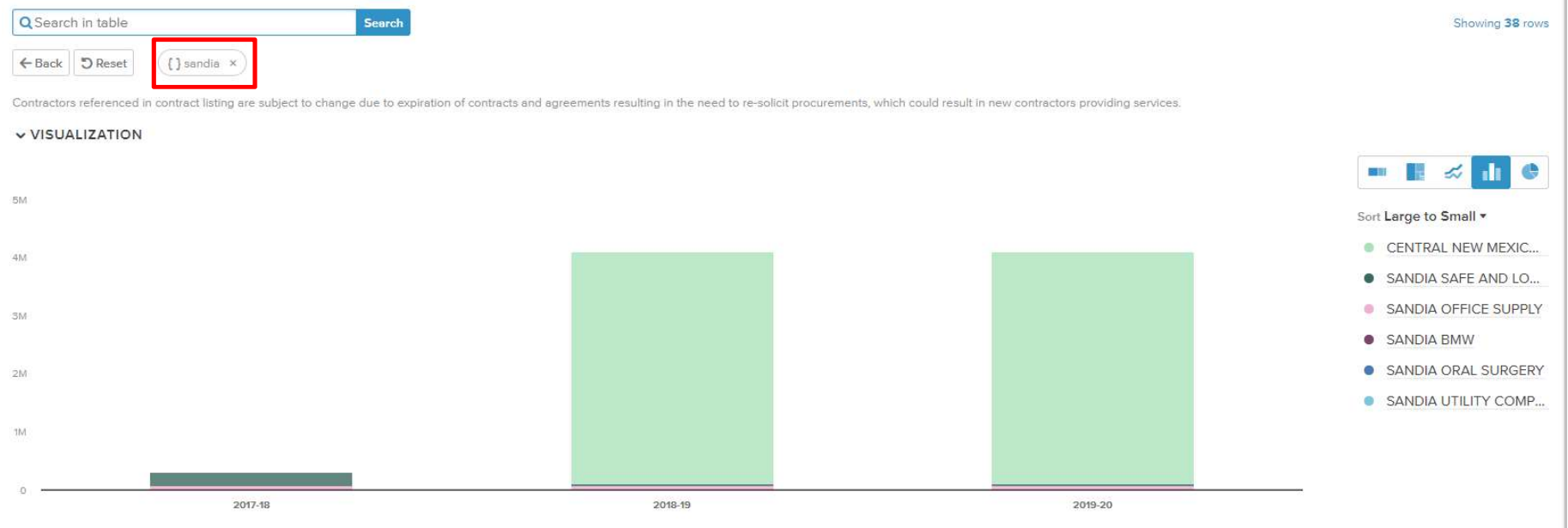
- Enter key word to filter by

CONTRACTORS CONTAINS

sandia

REPORTS – FILTER BY CONT.

- Report shows all Contractors containing 'sandia'
- Any filter that's applied will show up under the search bar

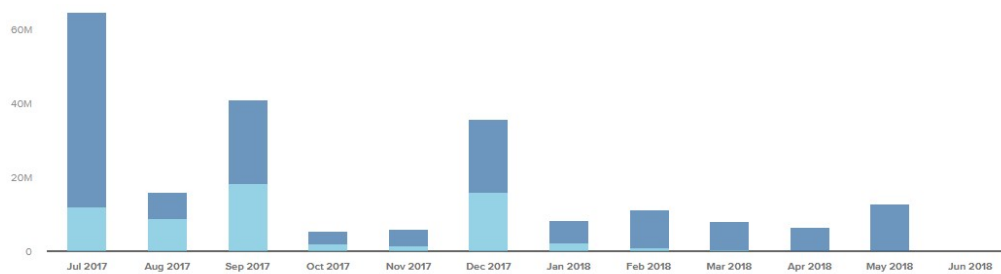


REPORTS - AMOUNTS

- Incremental - view data per period (total per month or year)
- Cumulative - view data year to date (adding all periods together)

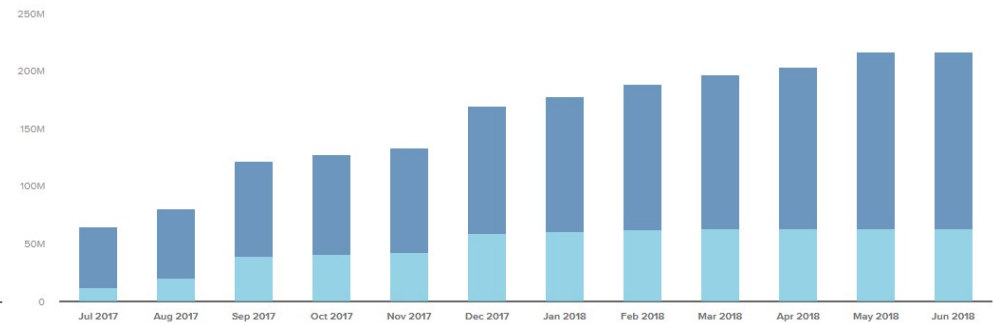
AMOUNTS

Incremental
Cumulative



AMOUNTS

Incremental
Cumulative



SUMMARY TABLE

- Shows data by the selection from the Broken Down By
 - Adds data by incremental and cumulative totals
 - Columns are shown by month or fiscal year
 - Click on titles to drill to data

Click on a
division to drill



Division	2015-16	2016-17	2017-18	2018-19	Total
HEALTH & PUBLIC SAFETY	\$373,671.85	\$310,438.57	\$243,767.30	\$13,309.23	\$941,186.95
FINANCE	141,726.72	84,909.97	149,224.82	33,233.22	409,094.73
COMMUNITY SERVICE	88,307.81	51,490.36	85,208.44	5,897.56	230,904.17
COUNTY MANAGER	72,157.98	55,948.89	78,606.95	17,958.26	224,672.08
PUBLIC WORKS	79,815.74	42,526.25	62,203.55	14,706.74	199,252.28
GENERAL SERVICES	10,958.49	5,554.66	24,704.68	6,534.90	47,752.73
Total	\$766,638.59	\$550,868.70	\$643,715.74	\$91,639.91	\$2,052,862.94

Adds data across all
fiscal years for a
single division



Adds data across
all fiscals years
and divisions



Adds data for all divisions per fiscal year



DETAIL TABLE

- Shows line item information for dataset, 'spreadsheet view'
 - Add filters to any columns by clicking on arrow
 - Filters will change based on date, text, or numerical data within the column
 - Click on a single cell in the table to search

Text Search

Department ▼

Q fleet x

Sort Ascending

Sort Descending

Hide Column

Clear Okay

ASSESSOR'S OFFICE
ASSESSOR'S OFFICE
ASSESSOR'S OFFICE

Numerical Search

Total Cost of Trip (\$) ▼

≥ 500 x

≤ To

Sort Ascending

Sort Descending

Hide Column

Clear Okay

1,861.68
1,861.66

Date Search

Conf Start Date ▼ Conf End Date ▼

≥ 07/01/2015 31

≤ 12/31/2018 31

December 2018

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

close

201	03/01/2018	03/22/2018
-----	------------	------------

Single Cell Search

2000 Threshold ▼ Code of Conduct ▼ Lodging ▼

Above \$1999.99

Above \$1999.99

Below \$2000.00

Search for Above \$1999.99

SEARCH BAR

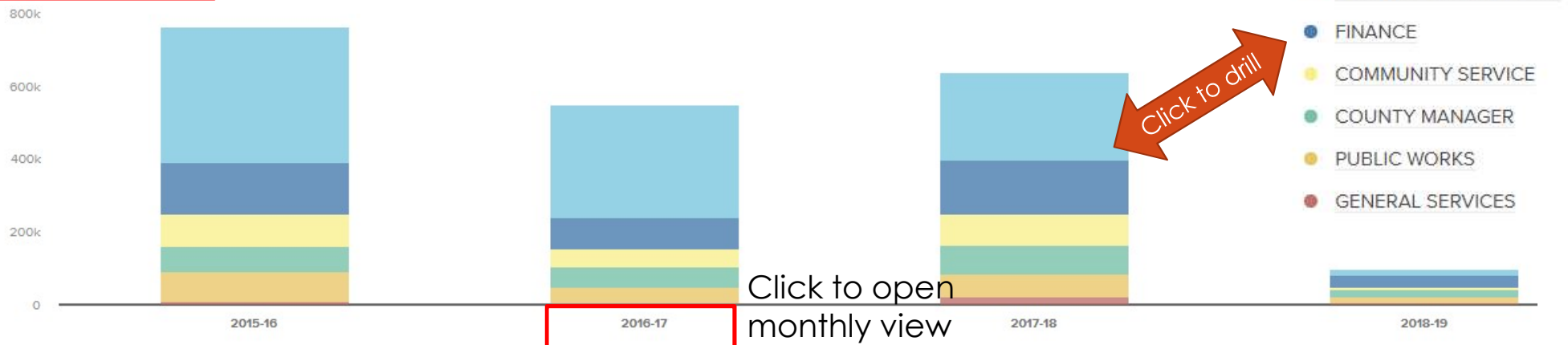
- Enter text, date, or number to search the entire dataset, searches all columns

Conference Name	Travel Justification and Benefit to the County
<u>GFOA</u> ANNUAL CONFERENCE	<u>GFOA</u> CONFERENCE AND CEUS WILL FOCUS ON GOVER...
112TH ANNUAL (<u>GFOA</u>) GOVERNMENT FINANCE OFFICERS ASSOCIATION	A RICH ARRAY OF CONCURRENT SESSIONS COVER A BR...
112TH ANNUAL <u>GFOA</u> ANNUAL CONFERENCE	AN ARRAY OF GOVERNMENT SESSIONS COVERING A RA...
GFOA ANNUAL CONFERENCE - ST. LOUIS	<u>GFOA</u> ANNUAL CONFERENCE PROVIDES A UNIQUE INDU...
112TH ANNUAL (GFOA) GOVERNMENT FINANCE OFFICERS ASSOCIATION	A RICH ARRAY OF CONCURRENT SESSIONS COVER A BR...
GFOA BUDGET ANALYST TRAINING ACADEMY	THIS TRAINING WILL IMPROVE EMILY'S FORECASTING CO...
BUDGET ANALYST TRAINING ACADEMY	REFERENCE ATTACHMENT: <u>GFOA'S</u> BUDGET ACADEMY IS...

GRAPH

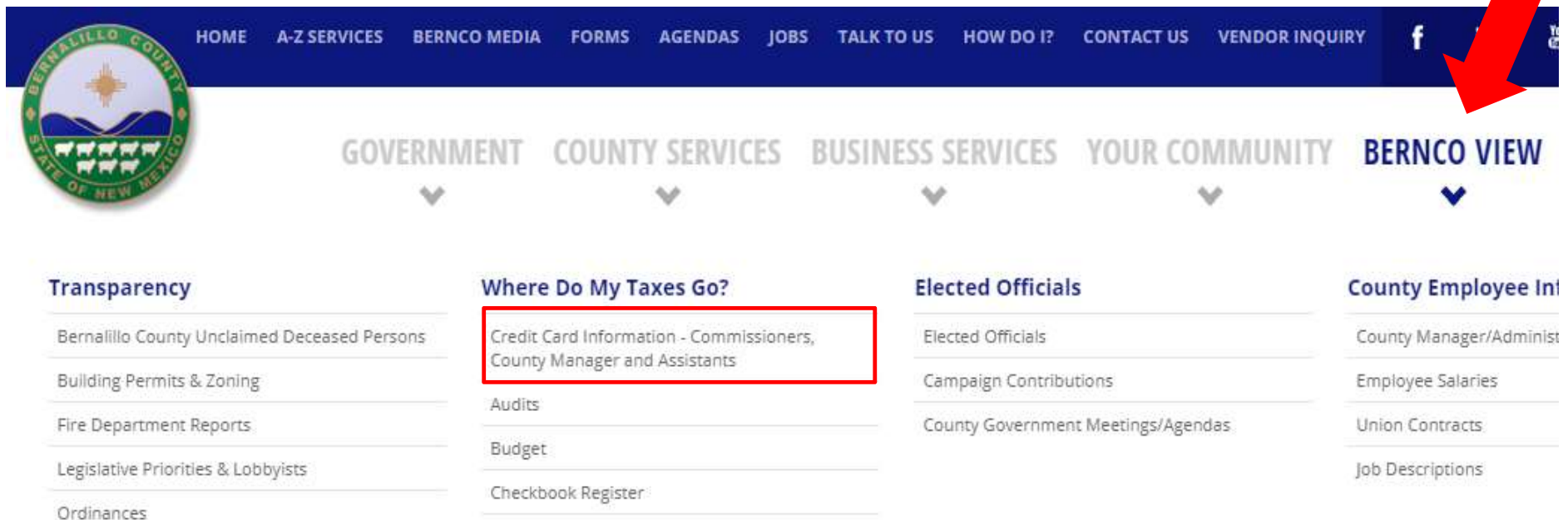
- Click on legend or graph to drill
 - Drill to monthly view by clicking on fiscal year
- Switch between graph types
 - Pie chart, bar graph, line graph, treemap, horizontal stacked bar graph
- Change Sort Order
- Open and close graph visualization to view data table

▼ VISUALIZATION



CREDIT CARD INFORMATION

- Shows card holder, amount, and vendor name
 - Transparent Report: commissioners, county manager, & assistants
 - Internal Report: all credit card holders
 - <http://www.bernco.gov/Bernco-view/credit-card.aspx>



The screenshot shows the Bernalillo County website navigation bar and main content area. The navigation bar includes links for HOME, A-Z SERVICES, BERNCO MEDIA, FORMS, AGENDAS, JOBS, TALK TO US, HOW DO I?, CONTACT US, and VENDOR INQUIRY. The BERNCO VIEW link is highlighted with a red arrow. Below the navigation bar, the main content area is divided into four columns: Transparency, Where Do My Taxes Go?, Elected Officials, and County Employee Information. The 'Where Do My Taxes Go?' column contains a red box around the link 'Credit Card Information - Commissioners, County Manager and Assistants'.

Transparency	Where Do My Taxes Go?	Elected Officials	County Employee Information
Bernalillo County Unclaimed Deceased Persons	Credit Card Information - Commissioners, County Manager and Assistants	Elected Officials	County Manager/Administrator
Building Permits & Zoning	Audits	Campaign Contributions	Employee Salaries
Fire Department Reports	Budget	County Government Meetings/Agendas	Union Contracts
Legislative Priorities & Lobbyists	Checkbook Register		Job Descriptions
Ordinances			

CONTRACT LISTING

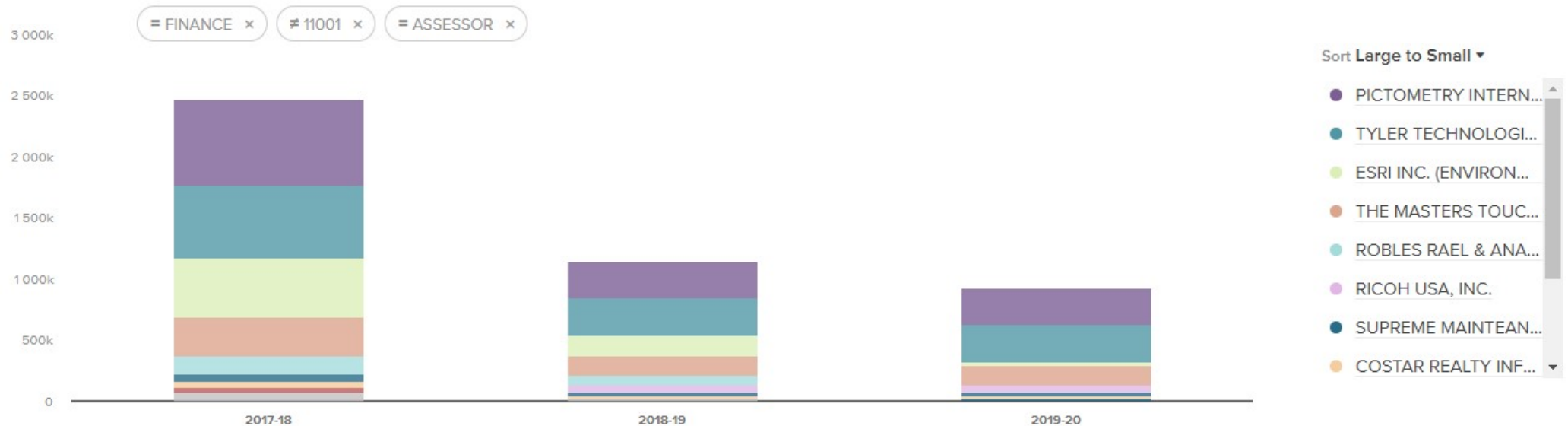
- Shows approved contract by the commission
- Contract Listing is updated 2x per year
 - Quarter 4
 - Sept Adjustments
- Search for contracts by...

Show Totals	Broken Down By	Saved Views
Contract Amount (\$)	Cost Assignment information (cost center, fund, GL account)	Cost per Contractor for each Division
	Department/Division	Cost per Contractor for each Departments
	Contractor	
	CCN#	

CONTRACT LISTING SCENARIO

- Find non general fund contracts for the Assessor's Office
 - Broken Down By Contractors
 - Exclude General Fund 11001

TOTAL FOR ALL YEARS

\$4,554,596.00

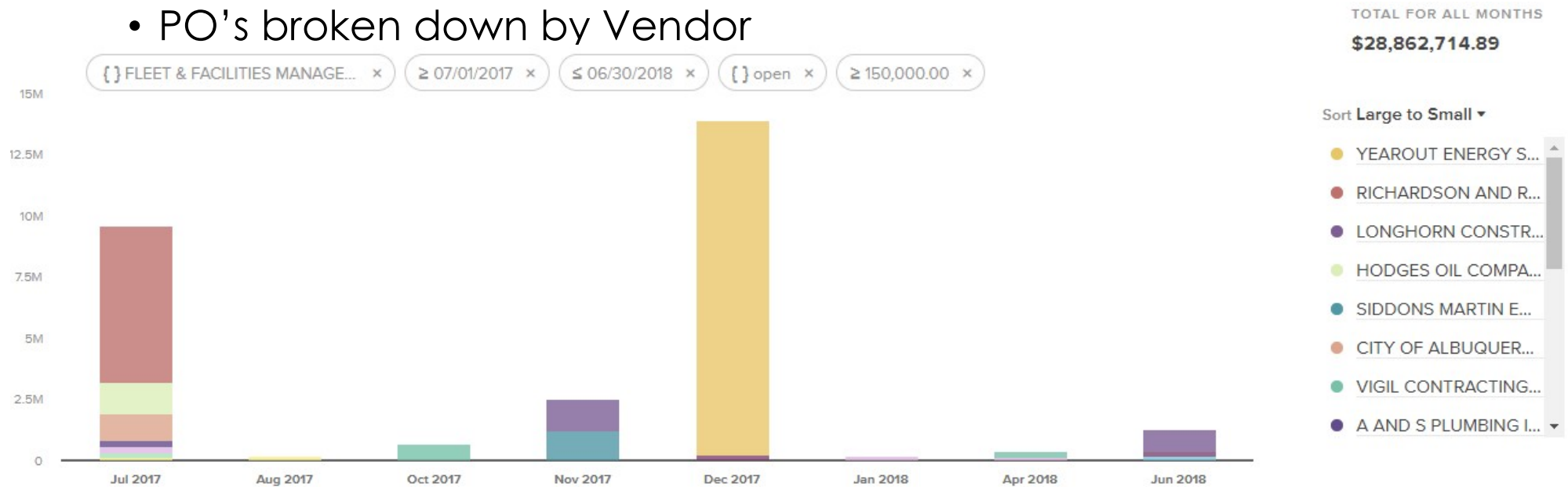
PURCHASE ORDER (PO) REPORT

- Shows open and closed PO's
- Line item listing of PO's from FY12 to present
- Search for PO's by...

Show Totals	Broken Down By	Saved Views
Net Order Value (\$)	Vendor number and name	PO's by State (including/excluding govt agencies)
Item # (NOTE: you must filter by Item# = 1)	Cost Assignment information (cost center)	PO's by County (including/excluding gov agencies)
	PO number	Department PO's by Vendor
	Procurement Method	
	Status (Open/Closed PO's)	

PO REPORT SCENARIO

- Find open PO's for Fleet & Facilities
 - By month
 - PO's over \$150,000
 - PO's broken down by Vendor



INVOICE AGING

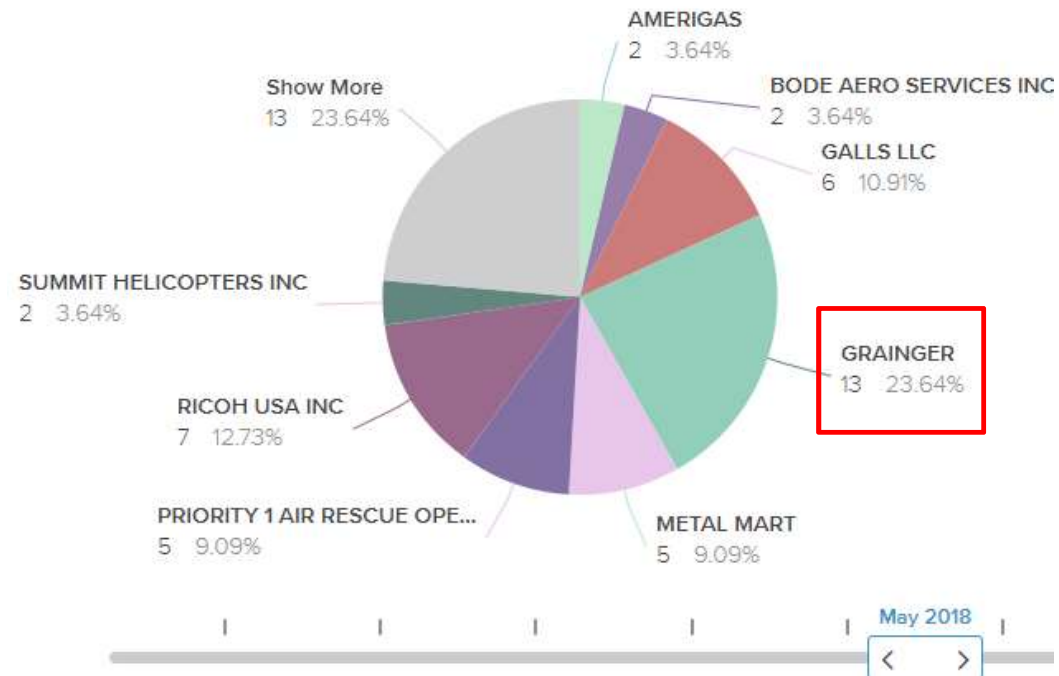
- Shows invoices paid within 30 days
 - Line item listing of invoices from FY12 to present
 - View data by # of invoices or \$ of invoices
- Search for invoices by...

Show Totals	Broken Down By	Saved Views
Count (# of Invoices)	Vendor number and name	# of Invoices Paid by Days
Line Item Amount (\$)	Invoice aging (# of days to pay invoice)	# of Invoices Paid by Division
	Payment method (Warrant, ACH, ePayables)	# of Invoices Paid by Payment Method
	Department/Division	\$ of Invoices Paid by Days
	Cost Assignment information (cost center, fund, GL/commitment item)	\$ of Invoices Paid by Payment Method
	PO #, Invoice Doc #	

INVOICE AGING

- Find the # of invoices for the Sheriff's Office
 - Invoices paid to Grainger
 - During May, FY18
 - Greater than 90 days
 - Invoices broken down by vendor (Payee Name 1)

Payee Name 1	Jul 2017	May 2018	Jun 2018	Total
GRAINGER	8	13	2	23
Total	8	13	2	23



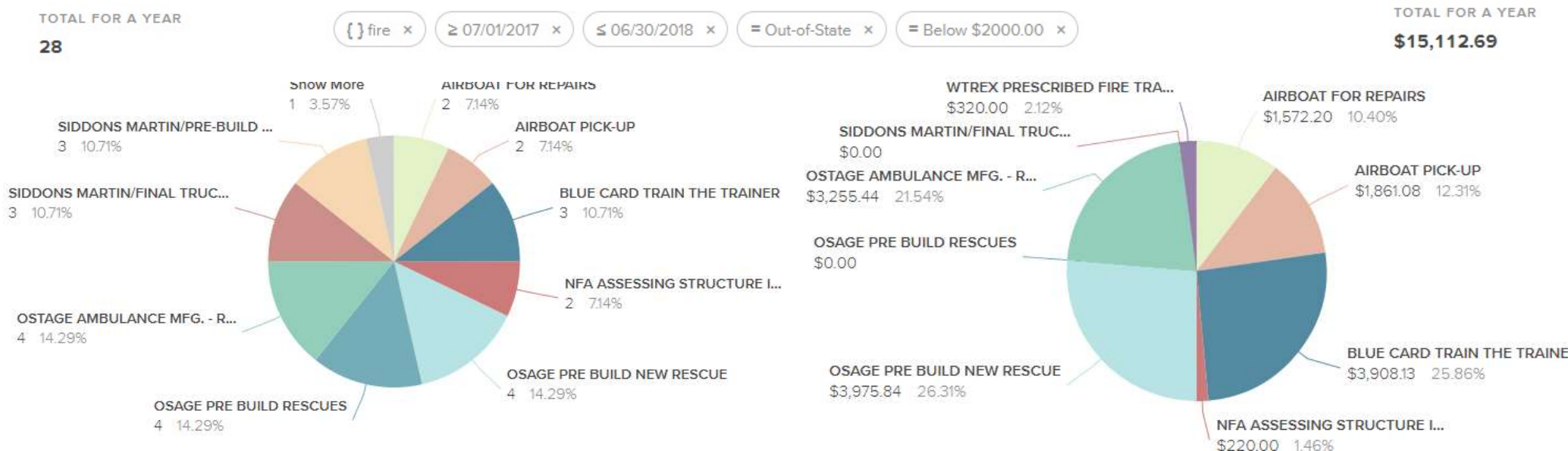
TRAVEL

- Shows approved expenses from the Travel/Reimbursement Form (TRF) in SAP Portal
- Search for travel/trips by...

Show Totals	Broken Down By	Saved Views
Total Cost of Trip (\$)	Employee	#/\$ of Trips by Division
# of Trips	Type of Training (Conference, Certification)	\$ of Trips per Department by Employee
Cost Categories (Meals, Conference, Airfare, Lodging, etc.)	Executive Review Thresholds (Code of Conduct, Foreign Travel, Over \$2000 Threshold, Lodging Over \$215)	#/\$ of Trips by Type of Travel
	Department/Division	#/\$ of Trips over \$5000 by City
	Type of Travel (In-State, Out-of-State, Local)	# of Code of Conduct Trips by Dept
	Conference Name	

TRAVEL SCENARIO

- Find the cost of trips and number of trips for Fire & Rescue
 - Out-of-State travel
 - Trips below \$2000 threshold
 - During FY18
 - Trips broken down by Conference Name



BI-WEEKLY POSITIONS

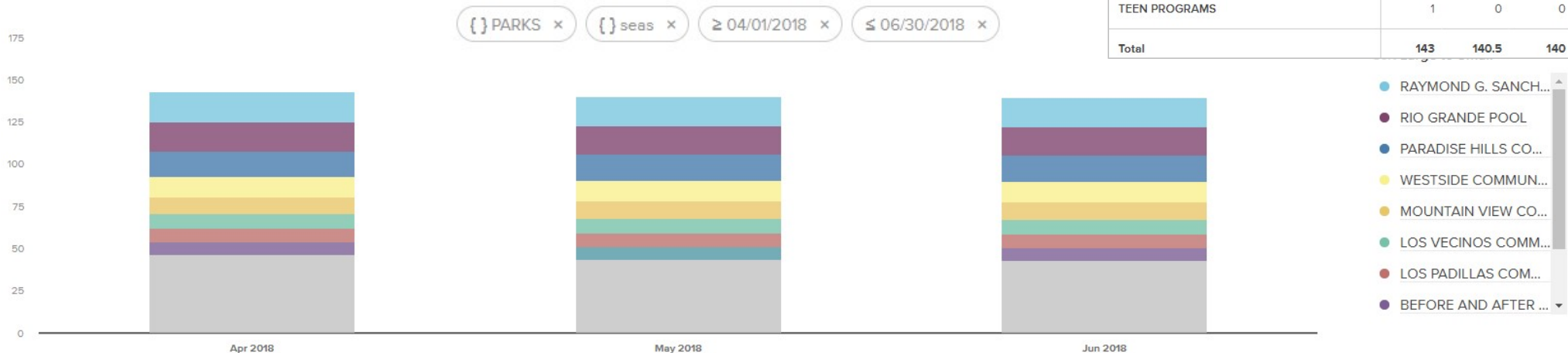
- Shows # of positions for FTE, Term, and Temp positions
- Includes filled and vacant positions
- Search for positions by...

Show Totals	Broken Down By	Saved Views
FTE Count	Department/Division	# of Positions by Department (All)
Total Salaries & Benefits (\$)	Cost Assignment information (cost center, fund, business area)	# of Vacant Positions by Department
Pay Categories (Annual Salary, PERA, Insurance, etc.)	Position Type (FTE=FR, PR; Term=TB, TN; Temp= FT, PT)	
	Job Title	
	Employee	
	Group (Seasonal, Blue, NREX, etc.)	

BI-WEEKLY POSITIONS SCENARIO

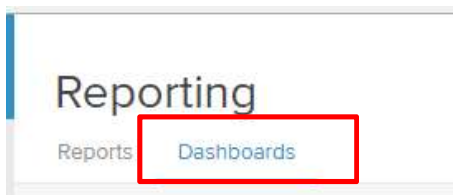
- Find the # of seasonal positions for Parks & Rec at the community centers
 - From April to June
 - Excluding Vacant Positions
 - Broken Down By Cost Center Description

Cost Center Desc	Apr 2018	May 2018	Jun 2018
PARKS SENIOR GRANTS	1.5	1.5	1.5
SPECIAL PROGRAMS	1.5	1.5	1.5
OPEN SPACE PROPERTY MANAGEMENT	2	1	1
COMPUTER CLUBHOUSE	1	1	1
SOUTH VALLEY MULTIPURPOSE CENTER	0.5	0.5	0.5
TEEN PROGRAMS	1	0	0
Total	143	140.5	140



DASHBOARDS

- High level, at-a-glance view of report data
- Combines data from any report in one place
- Click on graph to get to report (detail information)



7. EXP Actuals CC Only by CI (Qtrly - Cumulative)



8. EXP Overtime (Qtrly - Cumulative)



8a. EXP Overtime (Yrly - Cumulative)



B. FY19 Approved Contracts - YSC



C. POs by Vendor - YSC

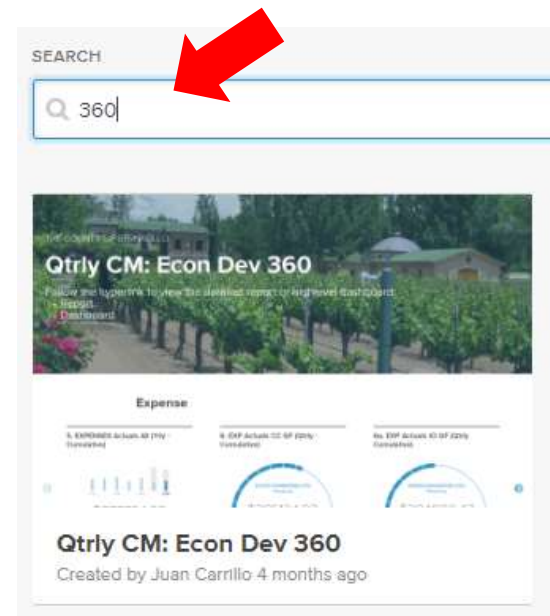
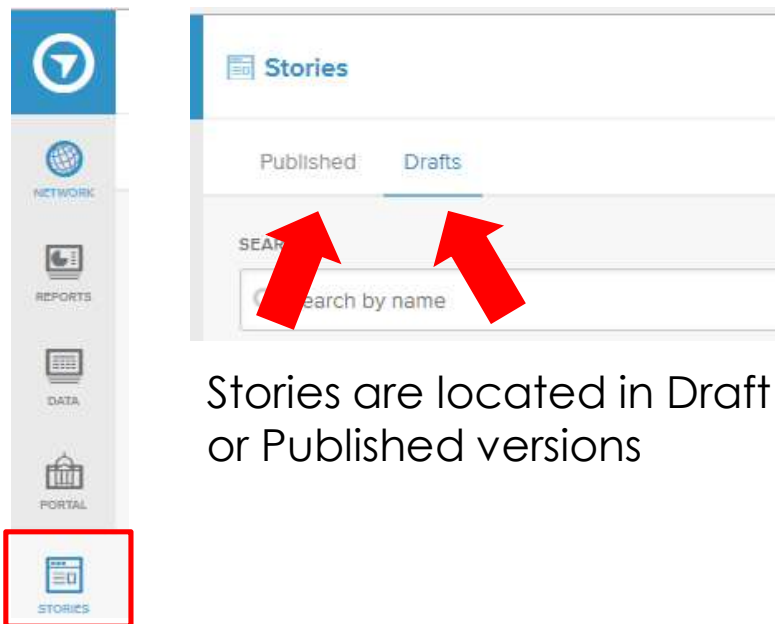


D. Travel - YSC



STORIES

- Add content and narrative to graphs/data
- Stories can be transparent to the public or internal, send link to share
- Combines data from any report in one place



Search Stories by key word or business area

Expense

Revenue

39

6. EXP Actuals CC GF (Qtrly - Cumulative)



4. REV by CI (Qtrly - Cumulative)



Economic Development- Expenses

File Edit View Insert Format Tools Add-ons Help Last edit was made 6 hours ago by Bernco Bernie



SHARE

Sign in



Expenses

6. EXP Actuals - General Fund: Click on [link](#) to answer the questions below

Quarter	Budget Questions	Department Response
FY18		
Quarter 4		

FUTURE REPORTS

- Do you have any reporting needs? What questions do you get asked the most?
 - Is there reports/data you review/share each month?
 - Do you have data you would like to share with the public?
 - Is there internal tracking you would like to share with your department at monthly staff meetings?
 - Do you have data in spreadsheets or systems?

WHAT'S COMING NEXT?

- Quarterly Budget Training hosted by Carlos Sanchez & Veronica Schornack
 - Training will take place in September
 - Review Quarterly Budget Report in OpenGov
 - Review new functionality
 - Stories
 - Google Doc
- Department specific trainings, upon request

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